PUBLIC EMPLOYEES' RETIREMENT SYSTEM PERS-HRD-88 (Rev. 7/89) (PC) **POSITION DUTY STATEMENT**	Title of Position: Retirement Program Specialist I Unit #: 921 Division and/or Subdivision: CSED/ Regional Office
INSTRUCTIONS: The Executive Officer is required by Government Code Section 18805 to report (or to record) "... material changes in the duties of any position in his jurisdiction." The Position Duty Statement is used for this purpose. Enter identifying information and effective date at the right. Enter brief description of each of the important duties and responsibilities of the position below. Group related duties in numbered paragraphs and indicate the proportion of total work time occupied. Prepare copies for employee assigned to the position and his/her supervisor.	Location of Headquarters: 400 Q Street, Sacramento, CA 95811 Class Title of Position: Retirement Program Specialist I Position Number: 275-921-5203-008, POS #2204, REC #6445 Effective Date: July 16, 2007

Percent of Time Required	Effective on the date indicated, the employee assigned to the position identified above performs the following duties and responsibilities:
	Under the general direction of the Regional Office Manager and working with Division management to support the goals and objectives of the CalPERS Customer Service and Education Division, the Retirement Program Specialist I performs the following duties:
50%	Provides retirement and health benefit counseling, education and assistance to members, retirees, beneficiaries, employers and the general public on an individual and group basis in the office and at field location sites. Explains how a retirement allowance is calculated which includes a detailed explanation of service credit, benefit factors and final compensation. Explains topics of moderate complexity on vesting requirements for retirement and health benefits; retirement options available; disability retirement counseling; effects of reciprocity; retirement process; reinstatement; taxability of retirement benefits; employment after retirement; cost-of-living and PPPA adjustments; and changing beneficiary and options after retirement. Applies the laws, rules, regulations, procedures and policies of CalPERS. Enters estimate request information on the automated calculation system. Reviews estimate output for accuracy. Utilizes the member, employer, contribution data bases and various tracking systems to respond to specific questions. Facilitates Financial Planning Seminars. Responsible for coordinating scheduling and conducting Financial Planning topics covered in the Financial Planning Seminars. Prepares materials and packages as needed. Determines meeting locations. Approximately 35% to 50% of time is spent at field locations conducting Retirement Planning Workshops, Financial Planning Seminars, group presentations, attending offsite training classes, special project team meetings and providing office coverage for other field offices when they are short staffed. Overnight travel may be required as well as after normal working hours and weekends. Provides retirement and health counseling to members in imminent death situations. Provides One on One retirement counseling sessions.
30%	Corresponds verbally and through written communication with members and employers regarding retirement issues of average complexity. Topics include information on processing of service and disability retirements, death benefits for active members, employment of retirees, calculation of allowances under various formulas, second-tier elections and benefits. Participates on special project teams as required. Assists the journey level staff on the more complex special projects by reviewing legal analyses, analyses of enacted and pending legislation, resource manuals, internal policy memoranda, circular letters, and materials from related outside sources, such as IRS and Social Security. Provides second level of escalation for support staff.
20%	Prepares and conducts customized presentations of average complexity for employee, employer and retiree groups while assisting the full journey level staff on the more sensitive and complex meetings such as, meetings with employer governing bodies. Assists employers in arranging for retirement contracts and amending existing contracts. Reviews and updates meeting scripts and visual aids as necessary. Assists in the development of the 6 month workshop schedule. On a timely basis, completes a work schedule for volume and time count for preparation of monthly management reports (Statistical Data Report). Office coverage is required from 8:00AM to 5:00PM.